2023-24 NABIP-TX Strategic Plan						
Mission Statement:				9/30/23		
The mission of the National Association of Benefits and Insurance Professionals, Texas Chapter is to inform and protect the consumer by enhancing the professional growth of it				12/31/23		
				3/31/24		
Vision Statement:				6/30/24		
To protect the future of consumer healthcare financing through education and advocacy while maintaining the highest standards of Ethics and Integrity.						
Chair	**Goal**	**Steps To Achieve Goal**		**Due Date**	**Complete?**	**NOTES**
EC Immed Past Pres	TAHU Honorees Corporation	Emphasize importance of all opportunities for contributions at BOD meeti	1st Q	9/30/23		
		conference calls and NABIP-TX Events	2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
	Continue Governance committee to review Bylaws and P&Ps	Monitor all NABIP-TX P&P's/Sunset review and ensure they are current a	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
	Arpprove Bylaws	Bring revised back to board and have membership meeting to approve	1st Q	9/30/23		
	Promote LPRT program and achieve blue ribbon status	Educate the chapters on the program by promoting through blast emails a	1st Q	9/30/23		
		working with them in gathering information necessary to achieve blue	2nd Q	12/31/23		
		ribbon status.	3rd Q	3/31/24		
			4th Q	6/30/24		
EC Secretary						
Membership	Maintain positive growth each quarter and increase retention		1st Q	9/30/23		
Growth			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
	Increase Awareness and Share Best Practices	Monthly chapter calls with Chapter Presidents, Membership/Retention Ch	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
		Provide NABIP membership powerpoint presentation for local chapters to	1st Q	9/30/23		
		during luncheons and events				
		Distribute prospective new member packet (NABIP Packet)	2nd Q	12/31/23		
	Monthly Outreach	Monthly Chapter eMail with Membership Results/Updates/Reminders	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
	Membership Recruitment-Landmark Award	Hold a membership blitz	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
	Membership Campaign-Landmark Award	100% Board recruitment contest	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
	Membership Campaign-Landmark Award	Ongoing membership campaign lasting 3-6 months roadshow	1st Q	9/30/23		
			2nd Q	12/31/23		

			3rd Q	3/31/24		
	Landmark Award Documentation	Call minutes and attendance template-Send to Awards Chair	2nd Q	12/31/23		
Membership	Increase retention rate to 85%		1st Q	9/30/23		
Retention			2nd Q	12/31/23		
	Roadshow to agency dues model participants		3rd Q	3/31/23		
			4th Q	6/30/24		
	Equip Membership/Retention Chairs	eCommerce Training	1st Q	9/30/23		
		Monthly Email Reminders to Local Membership/Retention Chairs to pull	1st Q	9/30/23		
		the new member report/lapse report/billed not paid	2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
Chapter Liaison	Reach out to Chapter Presidents in advance of EC visits to	Determine if chapters need assistance with marketing efforts and	1st Q	9/30/23		
	see how their marketing of the membership meetings is going	membership recruitment to concide with their events	2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
	DEI Marketing piece	translate pieces to spanish for the website	2nd Q	12/31/23		
	Value of Membership Education roadshow	Schedule monthly conference calls to discuss issues, hold webinars and	1st Q	9/30/23		
		at luncheons and special events	2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
Medicare Chair	Hold a medicare Summit in August 2023	Complete by Q1	1st Q	9/30/23		
EC Treasurer						
Professional	Educate chapter PD chairs on development process in providing dynamic	Prepare and Disbribute Potential Speaker list to all PD Chairs	1st Q	9/30/23		
Development	presentations					
		Schedule initial and monthly PD Calls	1st Q	9/30/23		
		Meet with PD chairs and develop scheduling plan of action	1st Q	9/30/23		
		Provide training for Virtual CE sessions for PD Chairs	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
Awards	Apply for NABIP Awards	Communicate award criteria and timeline with board chairs - Landmark,	1st Q	9/30/23		
		Presidential Citation, Media Relations, Legislative Excellence, Website	2nd Q	12/31/23		
			3rd Q	3/31/24		
	Continue online submissions	Continue process for NABIP-TX chapter submissions	1st Q	9/30/23		
	Dropboxes to open at the beginning of the year at Leadership training		3rd Q	12/31/23		
			4th Q	3/31/24		
	Conduct quarrterly meetings with local awards chairs	Quarterly meetings for dropbox training	1st Q	9/30/23		
	Deadline for submission of NABIP-TX awards remains February 25		2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
Vanguard	Provide communication and support for chapter goals	provide specific initiatives for chapter levels	1st Q	9/30/23		

		succession planning	2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
		Host a Vanguard event during the year	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
		work with colleges with insurance/risk management	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
LPRT	Promote LPRT	4 times a year	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
EC 2nd VP						
Legislation	Keep membership informed on all association, state and	Have a Legislative Day focused on industry legislative and	3rd Q	3/31/24		
	federal legislative activities.	regulatory developments				
		Proactive communications with respect to major state or federal issues	1st Q	9/30/23		
		weekly	2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
		Hold Monthly Teleconferences with the Legislative Council	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
		Hold Monthly Legislative Teleconferences with the Legislative Council an	1st Q	9/30/23		
		Local Chapter Legislative Chairs and Chapter Representatives	2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
		Develop 2 legislative press releases/ OpEd by 4th quarter	4th Q	6/30/24		
	Enhance Key Contacts Program	100% of assignment to targeted legislators	4th Q	6/30/24		in process
		key contacts day for local chapters	1st or 3rd			
	Industry Relations	8 meetings by the 4th quarter	4th Q	6/30/24		in process
	Increase member participation in NABIP-PAC and NABIP-TX PAC	100% of State and Local Board participation	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
		Top 3 NABIP-TX PAC Contributor Recognition	4th Q	6/30/24		in process
	Legislative Article in NABIP-TX magazine	One per issue of the magazine	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
EC 1st VP						

Communications	Actively engage with Chapter Representatives for Press Release to local media	Hold quarterly conference calls	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
	Actively engage with Chapter Representatives for Op Ed pieces to local media	Hold quarterly conference calls	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
	Actively engage with Media Chair for Op Ed pieces to local media	Hold quarterly conference calls	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
	Gather Media contacts from local Media Chairs	Update media contacts	1st Q	9/30/23		
	Submit Press Releases to Media	awards for state board and awards	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
	Submit Op Ed Pieces to the Media	op-eds	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
	Present Working With The Media presentation at the Strategic Planning Meeting	Present Working With The Media presentation at Leadership Training	1st Q	9/30/23		
	Win National Media Award	Send award requirements to Awards Chair as they are received.	3rd Q	3/31/24		
NABIP-TX Enews	Keep membership informed of state chapter activities	Distribute Enews bi-monthly to include information regarding chapter	1st Q	9/30/23		
	on a regular basis.	activities.	2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
		Update format and look to include Hot links to FB, etc.	1st Q	9/30/23		
Newsletter	Keep the membership informed on association activities	Have electronic issues published on time each quarter.	1st Q	9/30/23		
	with articles to enhance knowledge and member	(Per issue requirements and due dates will be distributed to Chapter	2nd Q	12/31/23		
	development.	Presidents and NABIP-TX Board by August 1, 2023)	3rd Q	3/31/24		
			4th Q	6/30/24		
Technology	Improve the traffic to the NABIP-TX website and win the NABIP website award	Work with awards chair	1st Q	9/30/23		
			2nd Q	12/31/23		
Technology	Review and update the website		2nd Q	12/31/23		
	Increase Social Media presence	goal: weekly posts with industry content, photos from meetings	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		

			4th Q	6/30/24		
SysOp	Keep communication channels open and current	Update state and chapter board rosters	1st Q	7/15/23		
EC President Elect						
Convention	Achieve or exceed budgeted attendance and sponsorship goals	Develop an appealing and catchy theme	1st Q	9/30/23		
		Identify important topics of interests for brokers/members by survey	1st Q	9/30/23		
		What is their main focus and concerns as well as target population				
		Save the date in Enews & NABIP-TX News	1st Q	12/31/23		
		Save the date to potential exhibitors & sponsors that includes an offer to	1st Q	9/30/23		
		sponsor the same event.				
		Build agenda with dynamic speakers focused around the needs identified	1st Q	9/30/23		
		by brokers/members and driving increased attendance	2nd Q	12/31/23		
		Expand list of exhibitors and sponsors	1st Q	9/30/23		
		Actively market to exhibitors & sponsors	2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
		Engage local chapter's participation and increase marketing emails to eac	2nd Q	12/31/23		
		chapter.	3rd Q	3/31/24		
			4th Q	6/30/24		
		Actively market to other associations and trade industries - Build List of Contacts	2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
		Marketing through social media	2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
		Expand list of attendees to include non-members	1st Q	9/30/23		
		Thank you to Exhibtors/Sponsors - Discuss commitment for next year	4th Q	6/30/24		
		Host a Welcome reception event at the conference	4th Q	6/30/24		
Chapter Presidents	Promote 100% NABIP-TX PAC participation by local board members	Include on every board meeting agenda for discussion	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
	Promote 100% NABIP PAC participation by local board members	Include on every board meeting agenda for discussion	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		

	Promote 100% Convention attendance by local board members	Include on every board meeting agenda for discussion	1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
	Promote Triple Crown and LPRT		1st Q	9/30/23		
			2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		
	Increased participation in meetings	find new speakers, new ideas, to help bring in members who aren't currently participating	1st Q	9/30/23		
		improve community outreach	2nd Q	12/31/23		
			3rd Q	3/31/24		
			4th Q	6/30/24		